Getting Started with RMP-V3

MANUAL

Recovery Manager Pro, LLC.

1.0 GETTING STARTED WITH RMPv3

1.1 RMPv3 Login Process

You must be at a computer with an internet connection to use RMP. Open your preferred web browser and navigate to https://www.recoverymanagerpro.com. Once you are viewing the page click on "Login" located at the top right of the page *(as shown in Figure1.1)*.

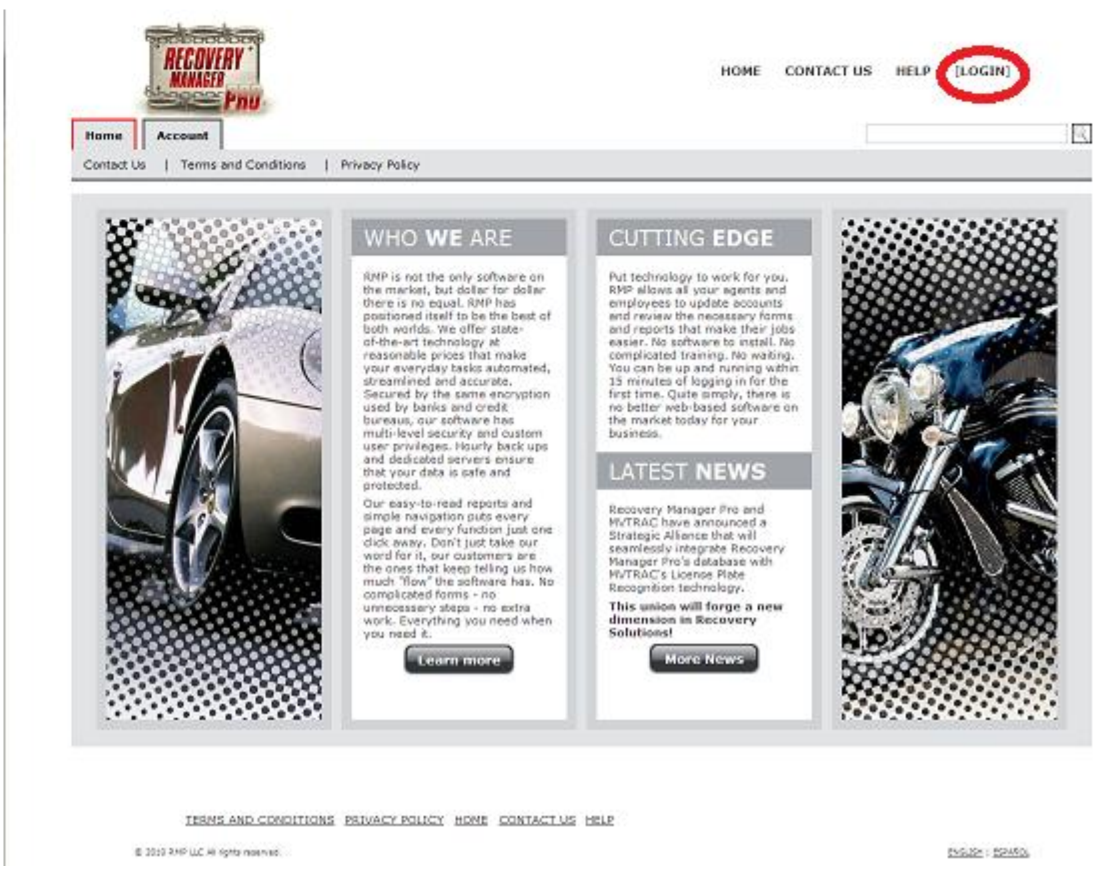


Figure 1.1

You will be forwarded to our Login interface. Input your User Name and Password provided to you by RMP and click the "Log On" button (as shown in Figure 1.2.

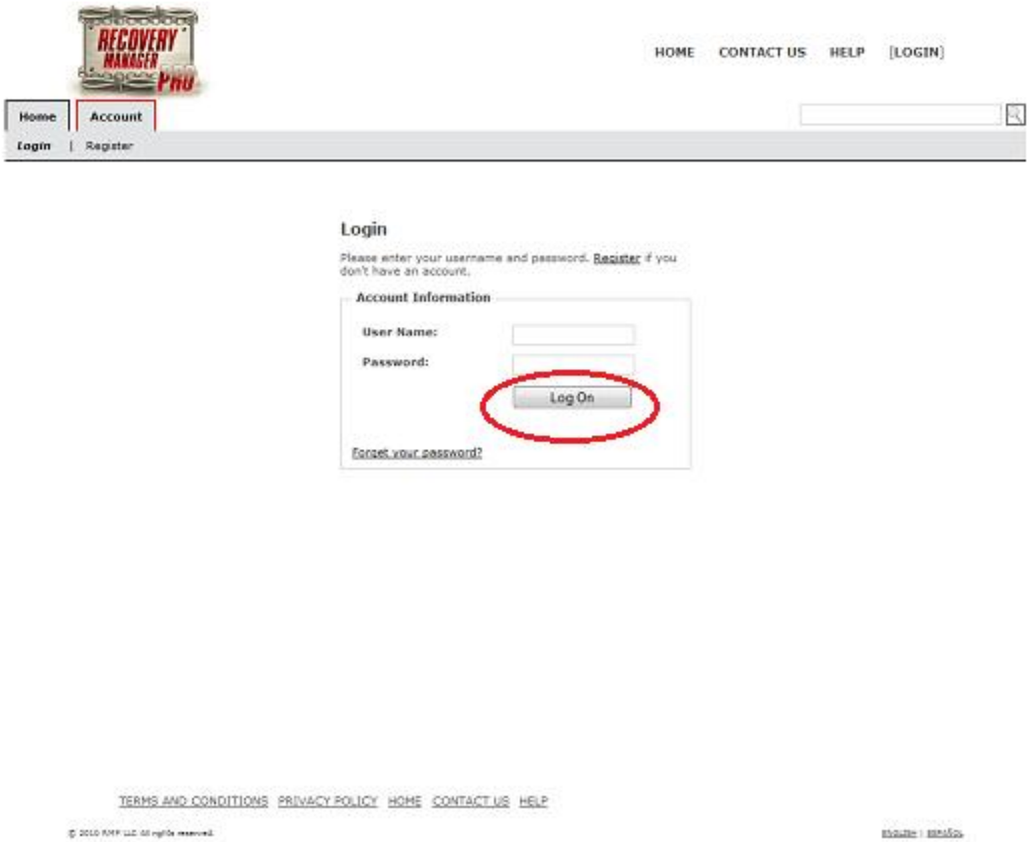


Figure 1.2

If this is the first time you have logged into RMPv3 you must change your temporary password. You will be forwarded to an password interface. Simply input your current password and the new password you wish to have and also verify the new password.

You have now successfully logged into RMPv3 and have landed on the RMP Switchboard.

1.2 RMPv3 Menus (Navigational)

Our menus are located at the top of each page. The parent menu displays the sub menu below it anytime you mouse over it. In figure 1.3 you will see the parent menu "Home" with the sub menu beneath it with Contact Us, Terms & Conditions and Privacy Policy. These menus are your navigational tools to get around RMPv3.

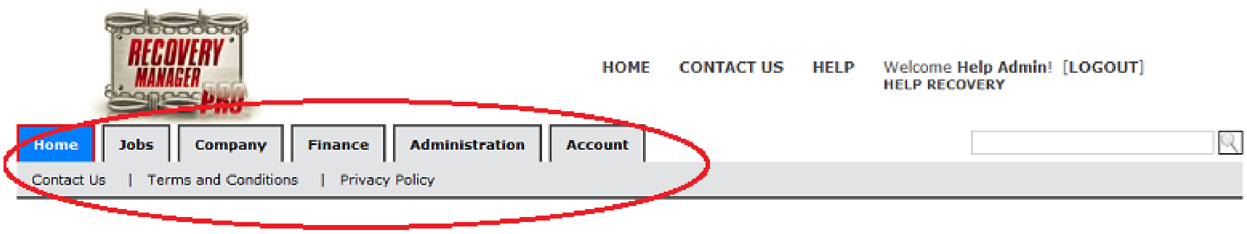


Figure 1.3

1.3 RMPv3 Search Process

To the right of the menus is where the Search Interface is located. To search RMP you can use the quick search to perform any search you perform on a daily basis (Case Number, Account Number, VIN, Last Name, First Name, Tag Number to mention a few). To perform a quick search just type your query information in the box (highlighted in figure 1.4) and click the search button to the right of the box of just hit "Enter" on your keyboard.

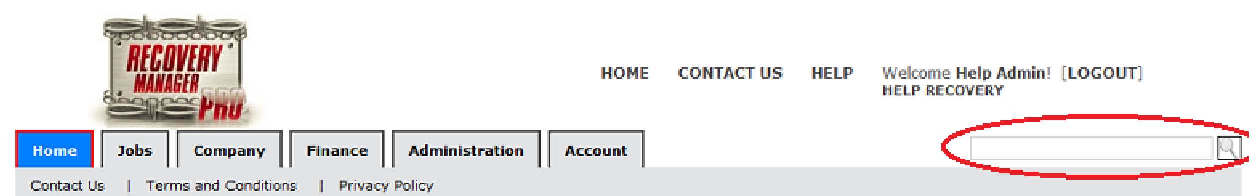


Figure 1.4

To do a more advanced search you can use the Advanced Search Interface. To get there just click the search icon to the right of the quick search textbox show previously in figure 1.4. Select the type of Advanced Search you wish to perform Case Search (search your company cases) , Companies Search (search companies within RMP), Contact Search (search your companies contacts), Event Search (search your companies events) and Finance Search (search your companies invoices & payments). Below in figure 1.5 you will see the RMP Advanced Case Search.

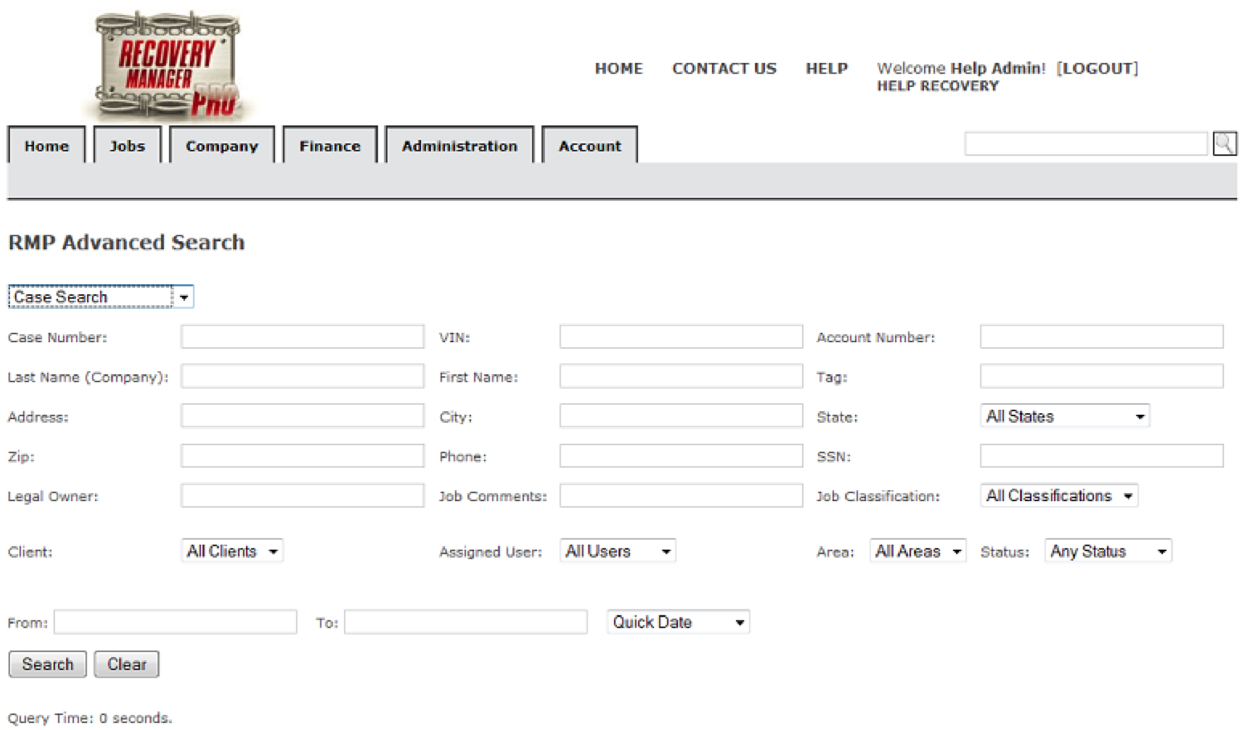


Figure 1.5

2.0 SETTING UP YOUR COMPANY

Now that you understand how to navigate around RMP you are ready to being setting up your company preferences. This guide will walk you through the process of adding users, roles & permissions to those users, clients, Recovery Agents (subcontractors), Company Contacts, preferences and more.

2.1 Company Profile

The company profile is where you will add your company connections (clients, subcontractors, police departments, auctions, etc…).To get to your company profile simply mouse over the "Company" parent menu and then to "Company Profile" as shown below in Figure 2.1.

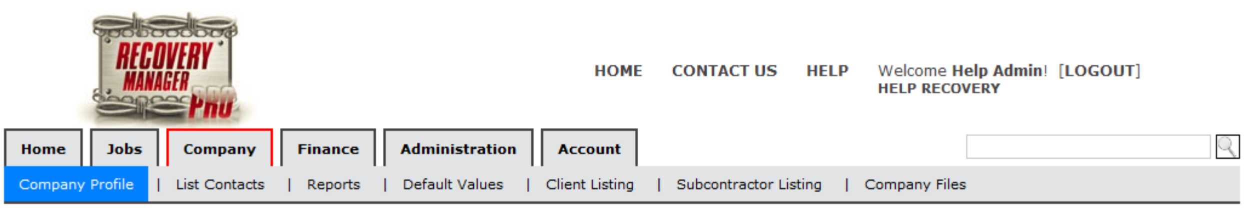


Figure 2.1

2.1.1 Company Connections

The first listing you will see in your company profile is the company connections listing. These connections are clients, subcontractors, police departments, auctions, and other company affiliates that you do business with.

To add a company connection click on "Add New" at the top right of the list and you will see the "Add New Connection" interface as show below in figure 2.2.

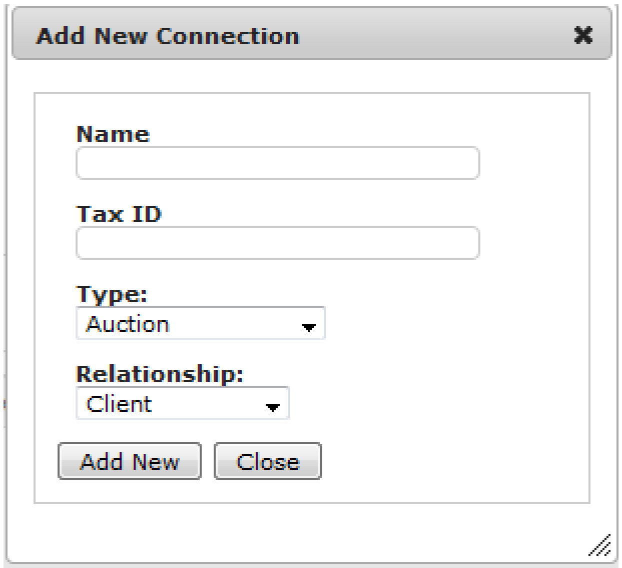


Figure 2.2

Now input the Name of the connection you are adding, the Tax ID (if applicable), the type of connection (available connection types are Auctions, General/Internet, Insurance, Law Enforcement, Lenders, Repo Agencies, Storage Companies, Towing Companies, Transport Companies). You can edit these connection properties as explained later in this section. If you see a connection type that we don't have please contact us to have that connection type added. Next add the relationship type. Those types are Client, Subcontractor & Other. Once you are done adding the information click the "Add New" button at the bottom left of the "Add New Connection" interface as shown below in the red circle in Figure 2.3.

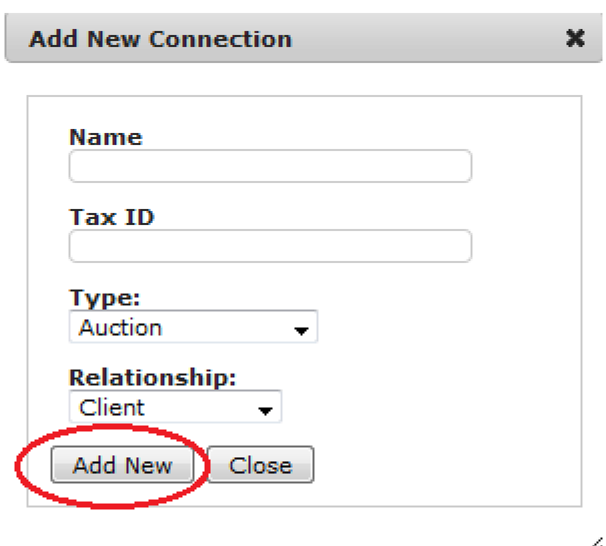


Figure 2.3

To cancel this process if you do not wish to save what you have input just click “Close” next to the “Add New” button as shown above in figure 2.3.
Edit Connection Preferences: In the company connections listing as shown below in figure 2.4 below.

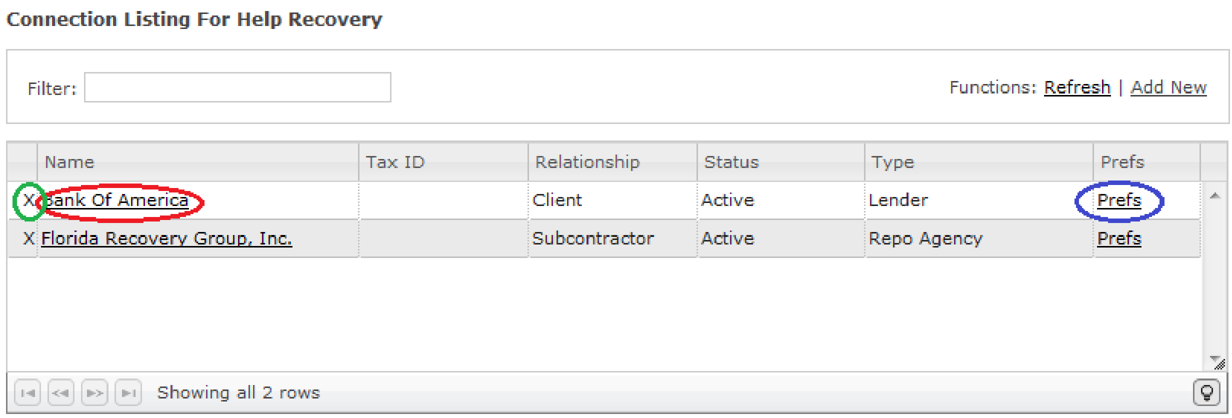


Figure 2.4

To edit a connection profile just click on the Name of the connection (shown in figure 2.4 circled in Red) and you will be taken to the Company Detail Profile. From this detail page you can add your Connection Contacts. You must add at least 1 primary contact for your connection. That contact must have an address & phone numbers. This is import for this connection’s address to be input on forms and invoices.

To add a connection contact click on “Add New” at the top right of the contact list and you will see the “Add New Contact” interface as show below in figure 2.5. Once the add contact interface is displayed select the contact type, First Name, Last Name, Phone Number, Phone Type Email Address and Address. Click the “Save” button at the bottom left of the interface to Save the new contact information. If you wish to cancel the new contact entry just click close next to the “Save” button at the bottom.

To edit a contact simply click on the “E” next to the Name of the contact or just click the name. Once you have clicked on the contact you wish to edit you will be taken to the Contact Profile interface as shown in figure 2.7. From this interface you can edit the contacts profile info such as name, birth date, driver’s license, and other info. For more detailed information on this refer the next section.

The Company Connections preferences can be edited by clicking on the "Prefs" as shown in figure 2.4 circled in blue. These are the connection default fees that will be used for invoicing and other forms. Once you have input the values for these simply click "Save" down at the bottom left of the preferences page.

2.1.2 Company Contacts

The 2nd listing you will see in your company profile is the company contacts listing. *THESE CONTACTS ARE NOT USERS!!* These are just contact for your company, all users of the system have a corresponding Company Contact file that goes with the user. The contacts you add in this listing will only be added as company contacts and not users. When you add users to RMP (as covered in section 2.1.4 of this pamphlet) they will be automatically added as a Company Contact at that time. You only need to add contacts to this listing that WILL NOT be users of RMP.

Add Contacts: To add a company contact click on "Add New" at the top right of the contact list and you will see the "Add New Contact" interface as show below in figure 2.5

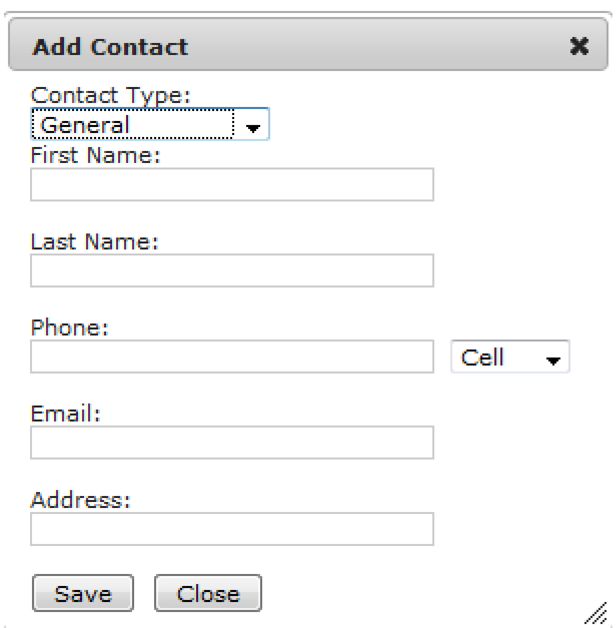


Figure 2.5

Once the add contact interface is displayed select the contact type, First Name, Last Name, Phone Number, Phone Type Email Address and Address. Click the “Save” button at the bottom left of the interface to Save the new contact information. If you wish to cancel the new contact entry just click close next to the “Save” button at the bottom.

Edit Contacts: To edit a contact simply click on the “E” next to the Name of the contact or just click the name itself (shown below in figure 2.6).

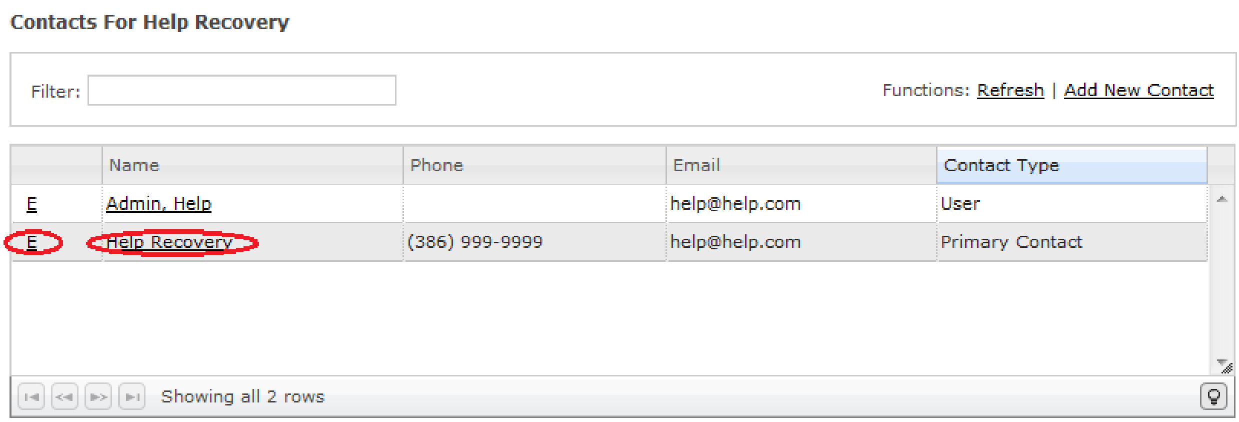


Figure 2.6

Once you have clicked on the contact you wish to edit you will be taken to the Contact Profile interface as shown in figure 2.7. From this interface you can edit the contacts profile info such as name, birth date, driver’s license, and other info.

Profile: To edit the Profile Information just click edit above the Profile Information block (marked with red circle in figure 2.7). Make the changes you wish to make and click “Update” at the bottom right of the edit interface.

Phone Numbers: To add contact phone numbers just click “Add” above the Phone Number block (marked with blue circle in figure 2.7). Input the phone number (numbers only), extension if any, Phone Type (Cell, Work, Home, etc…) and the default status is already set to “Active. Now click “Save at the bottom left of the Add Phone interface. To cancel additions or changes just click “Close” next to the “Save” button at the bottom.

To Edit Phone a phone number just click on the phone number you wish to edit, make the changes you wish to make and click Save at the bottom left

of the Add Phone interface. To cancel additions or changes just click "Close" next to the "Save" button at the bottom.

Email Addresses: To add an email addresses just click the "Add" button at the top of the Email Addresses block (marked in green on figure 2.7). Input the email address, type of email (Work, Personal, Other) and click the "Save" button at the bottom of the interface. To cancel input just click the "Close" button.

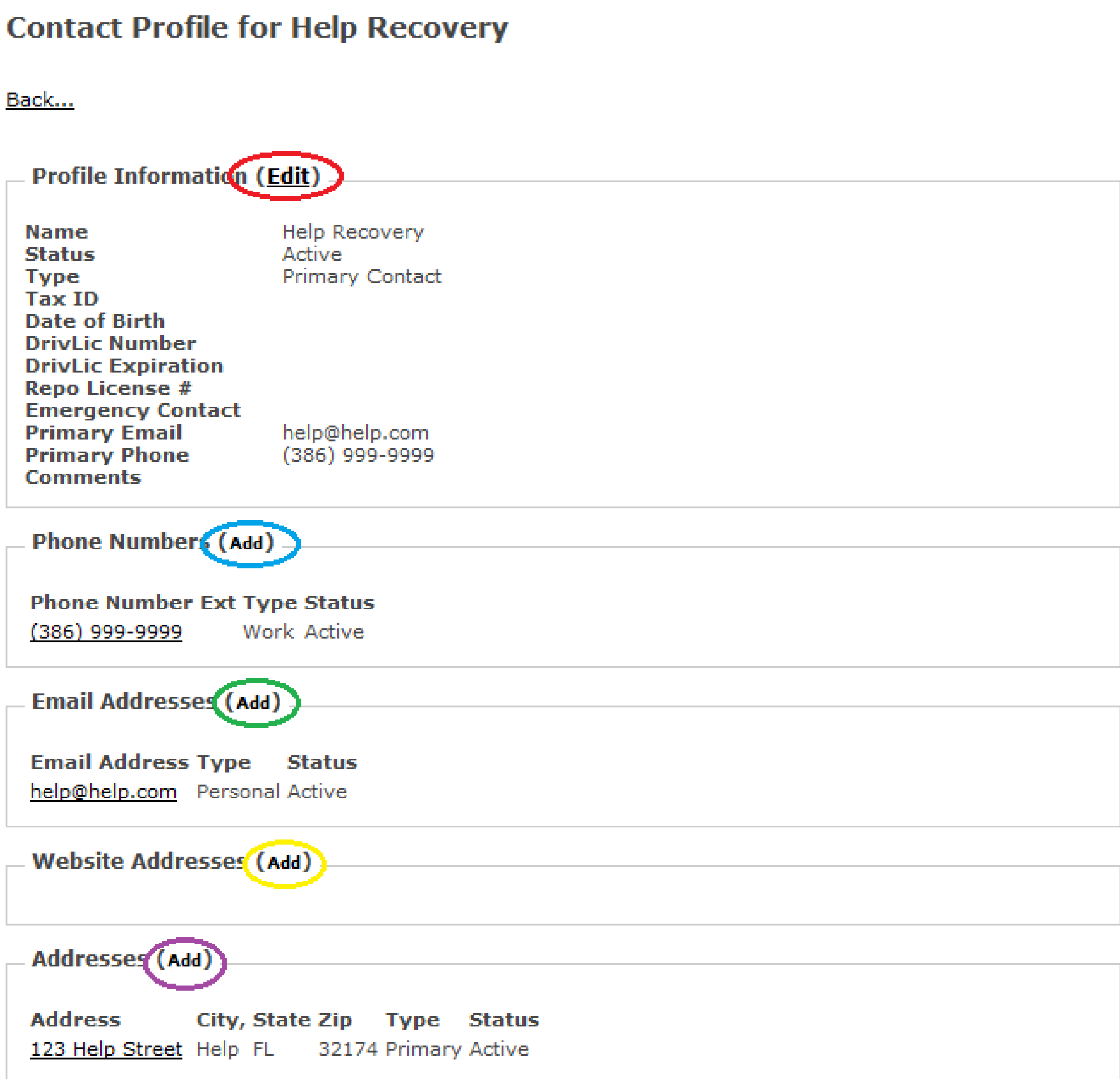


Figure 2.7

To edit an email address just click on the email address itself, make the necessary changes and then click “Save” at the bottom or “Close” to cancel the changes made.

Contact Addresses: To add an addresses just click the “Add” button at the top of the Addresses block (marked in purple on figure 2.7). Input line 1 & 2 of the address, City, State & Zip, an Address Name (if any), type of Address and click the “Save” button at the bottom of the interface. To cancel input, just click the “Close” button.

To edit an address just click on the address itself, make the necessary changes and then click “Save” at the bottom or “Close” to cancel the changes made. The Add Address block is shown below in figure 2.8.

Figure 2.8

2.1.3 Company Users

The 3rd listing you will see in your company profile is the company users listing. This is a list of all the users that have access to RMPv3. Once you create a user they will be assigned a role of Case Worker automatically by RMP. You can add any role you wish the each user RMP default roles consist of Administrator, Manager, CSR, Case Worker, Limited Case Worker, Field Agent, & Lot Manager. You can create new roles for your company and assign those roles to users as well. These roles can be added to the user by following the instructions under "Adding Roles to Users" in this section.

Add Users: To add a company user click on "Add New" at the top right of the user list and you will see the "Add New User" interface as show below in figure 2.9.

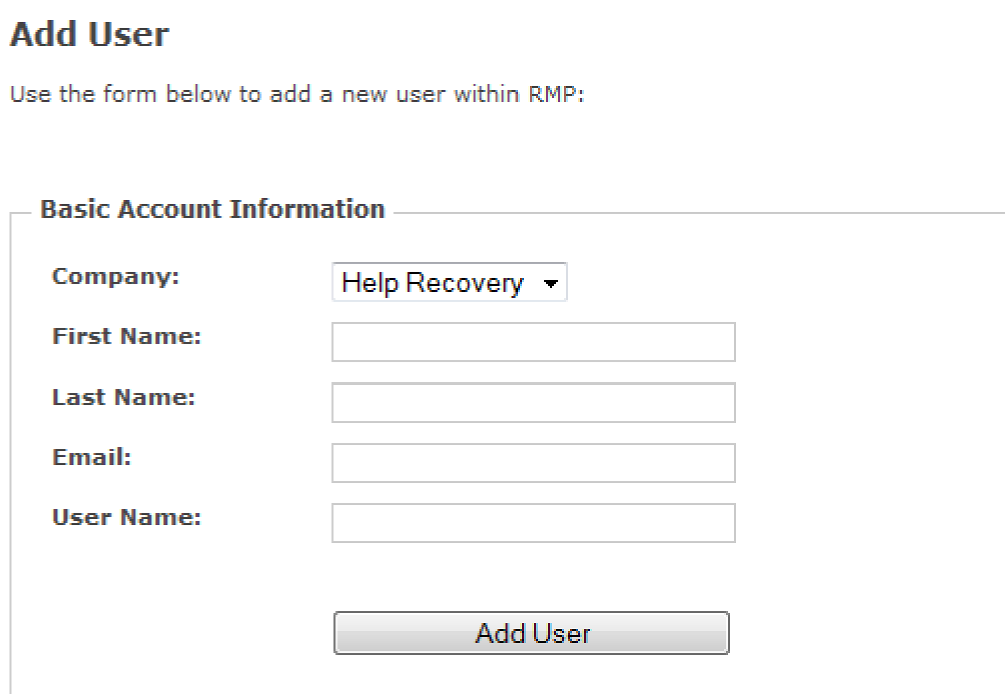


Figure 2.9

Once the "Add User" interface is displayed input the First Name, Last Name, Email Address (must be valid, an email will be sent to the user with a temporary password) and the User Name that the user would like to

have. If the user name has been used in RMPv3 you will be prompted to select a new unique one. Once this is complete, click the “Add User” button at the bottom of the interface.

Edit Users: To edit a user simply click on the user name in the Users Listing (shown below in figure 2.10 circled in red). You can also edit the users contact record by clicking on the Name (shown in figure 2.10 circled in green). See Section 2.1.1 for editing contact profiles.

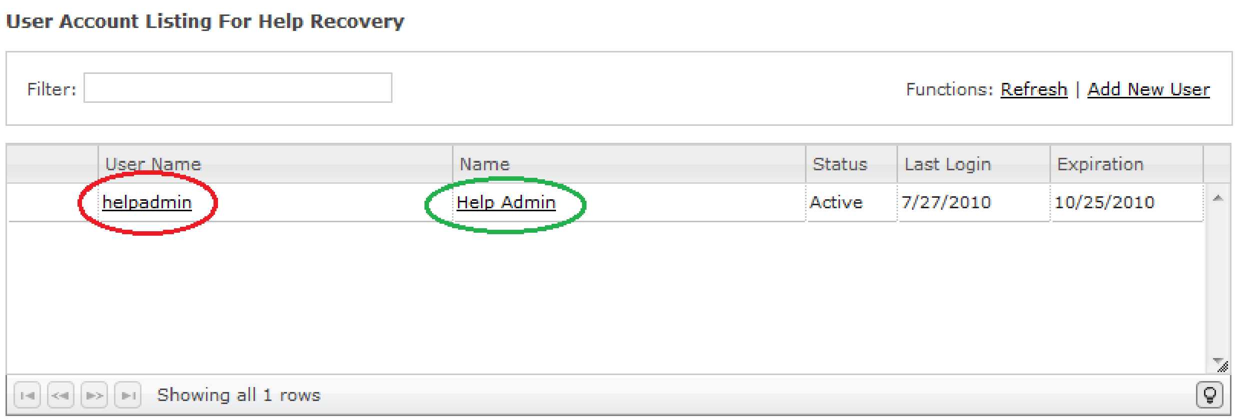


Figure 2.10

Once you have clicked on the user name you wish to edit you will be taken to the Account Details interface as shown in figure 2.11. From this interface you can change the users password (must have an Administrator or Manager role to perform this action) and add Security Roles to the user.

Adding Role to Users: To add a role to a user click on “Assign New Role” as shown in figure 2.11 circled in Red. You will see a pop up window with a list of your company roles that you can assign to the user. Simply select the role from the list and click “Assign Role” at the bottom of the pop up window. To cancel assigning a role simply click “Close” at the bottom next to the “Assign Role” button.

Deleting Role from User: : To delete a role from a user click on the “X” just to the left of the role you wish to delete, as shown in figure 2.11 circled in Green. You will see a confirmation message to verify that you wish to delete the role from the user. Click “OK” to perform the deletion or click “Cancel” to cancel.

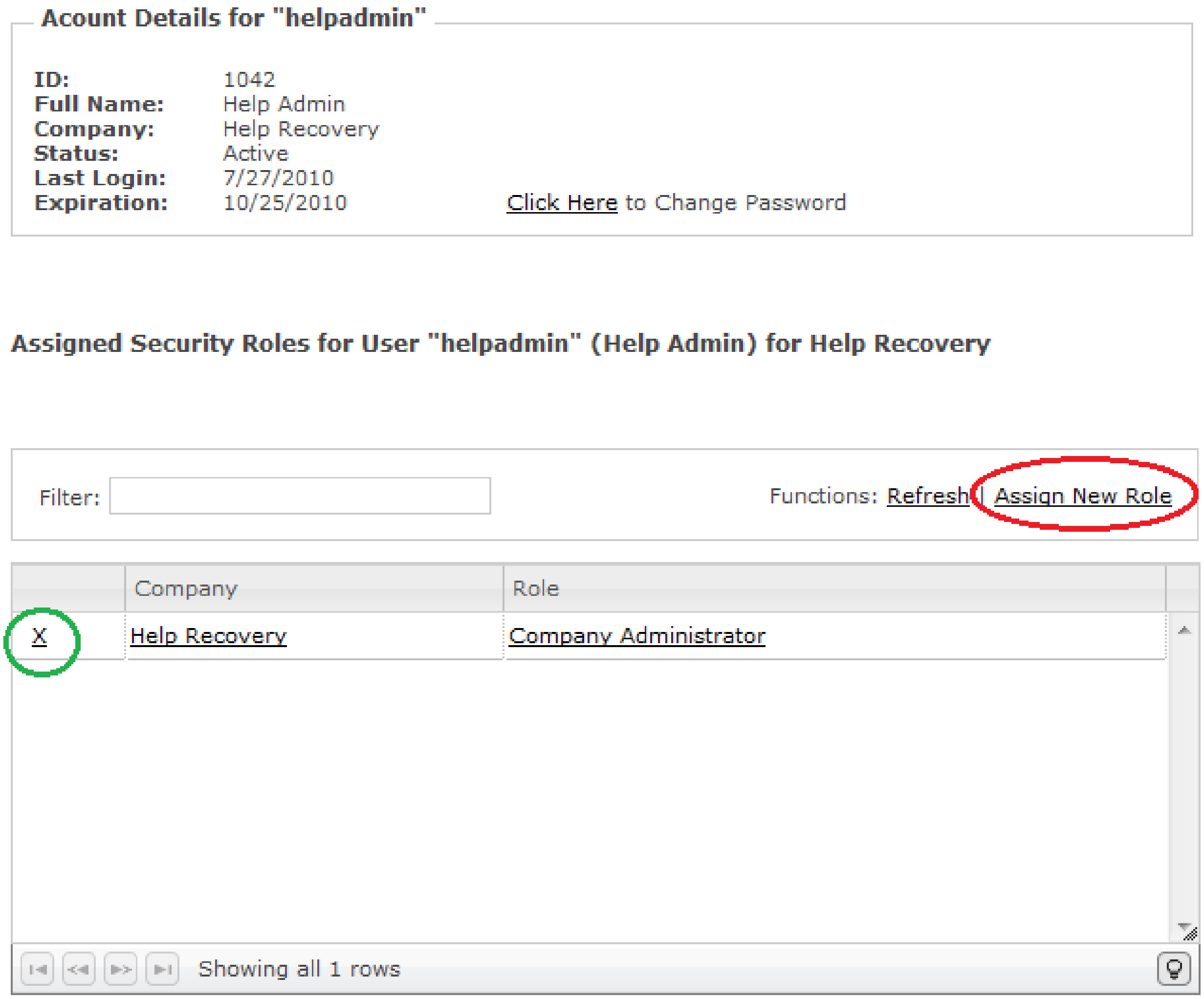


Figure 2.11

Located at the top of the Company Profile interface you will see 4 text links. These links are show in figure 2.12 circled in red. The links are “Edit Company”, “Default Values”, “Company Preferences”, and View Company Public Information”. Each one of these links is covered in this section.

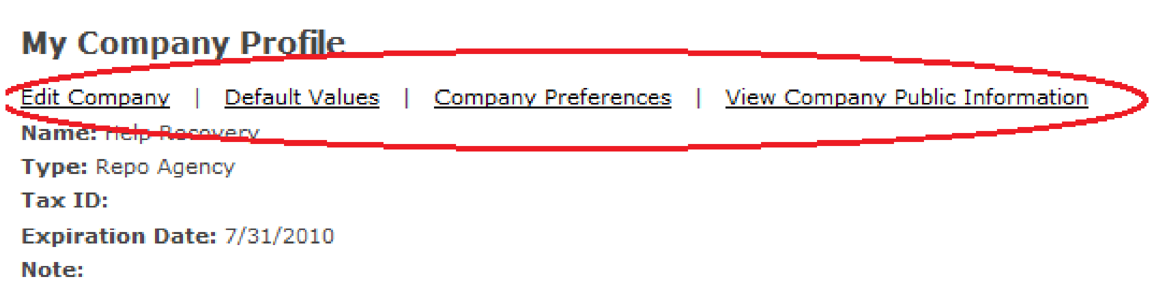


Figure 2.12

2.1.4 Edit Company

The first link (as shown above in figure2.12) is "Edit Company". Click on this to edit your basic company information such as Company Name, Tax ID, Type of Company and any notes. The "Edit Company" interface is shown below in figure 2.13. Once you have made the changes you wish click "Save" at the bottom of the interface as shown below circled in red. Once you are done with your changes click the "Back" button at the top left of the page as shown circled in green below.

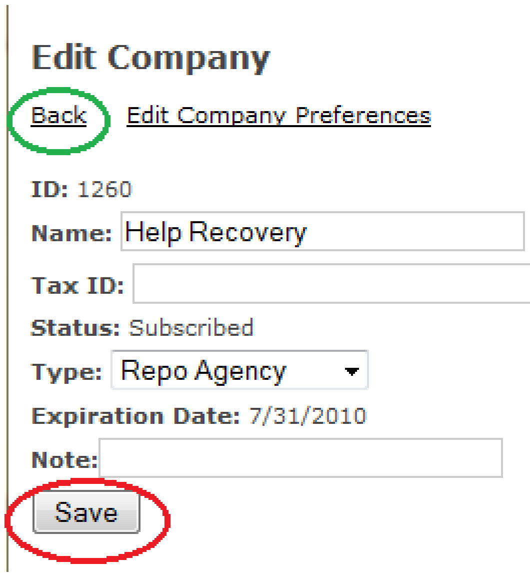
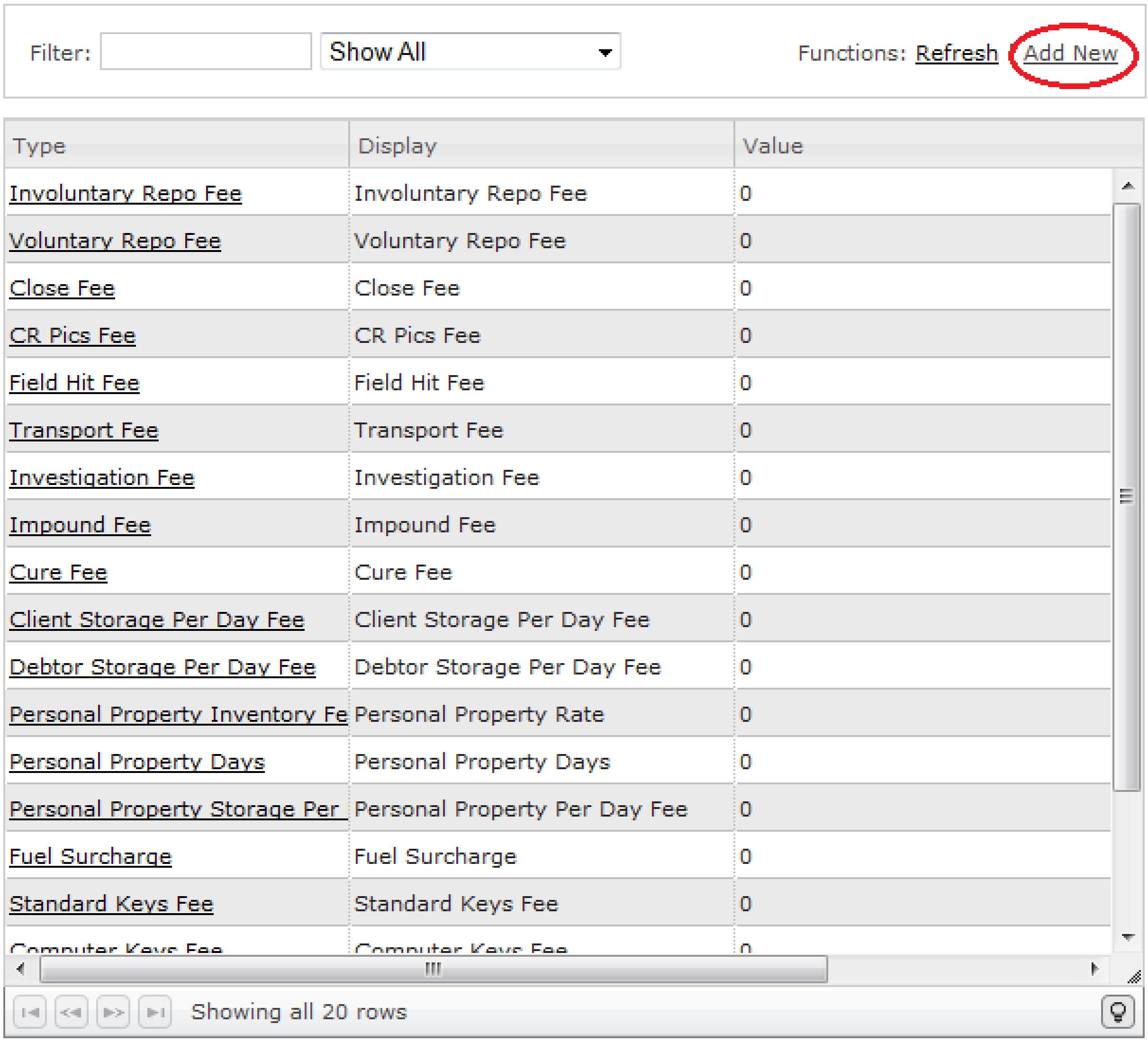


Figure 2.13

2.1.5 Default Values

The default values section is where you input your default fees and values for your company. These types of fees and values are Areas of Operation, Custom Fees, Job Classifications, and Job Update Templates. This page comes with a standard set of fees that you will need to update. These fees are used in RMP to automatically set new client fees to these values. You have the ability to change the client fees at any time this is just to save you time in your setup.

Edit Existing Default Values: In the Default Values Listing as shown below in figure 2.14 simply click on the value you wish to change.



Type	Display	Value
Involuntary Repo Fee	Involuntary Repo Fee	0
Voluntary Repo Fee	Voluntary Repo Fee	0
Close Fee	Close Fee	0
CR Pics Fee	CR Pics Fee	0
Field Hit Fee	Field Hit Fee	0
Transport Fee	Transport Fee	0
Investigation Fee	Investigation Fee	0
Impound Fee	Impound Fee	0
Cure Fee	Cure Fee	0
Client Storage Per Day Fee	Client Storage Per Day Fee	0
Debtor Storage Per Day Fee	Debtor Storage Per Day Fee	0
Personal Property Inventory Fe	Personal Property Rate	0
Personal Property Days	Personal Property Days	0
Personal Property Storage Per	Personal Property Per Day Fee	0
Fuel Surcharge	Fuel Surcharge	0
Standard Keys Fee	Standard Keys Fee	0
Computer Keys Fee	Computer Keys Fee	0

Figure 2.14

Once you have clicked on the fee/value to change a pop up window will appear to “Edit” the default value selected. You can change the display name and the value. Click “Save” at the bottom of the pop up to save your changes.

Adding New Default Value: To add a new default value just click on the "Add New" as shown above in figure 2.14 circled in red. The "Add Default Value" pop up window will appear as shown in figure 2.15.

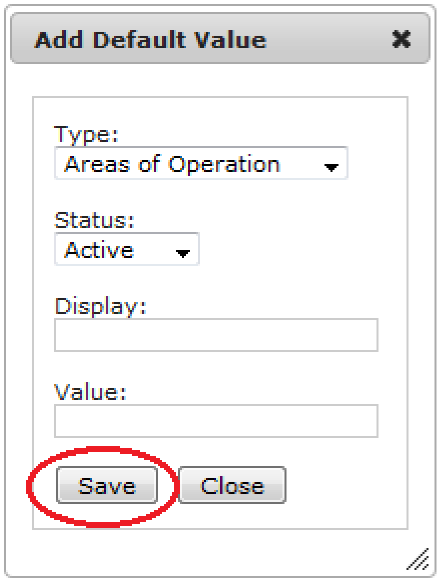


Figure 2.15

Select the Type of Value you wish to save (Areas of Operation, Custom Fees, Job Classifications, and Job Update Templates), the Status will be defaulted to "Active", input the Display Name and then the value. Once completed, click "Save" as shown in figure 2.15 circled in Red. You can add as many defaults as you wish.

2.1.6 Company Preferences

The Company Preferences interface is for your company level preferences such as Time Zone your company is located, your company default emails for RMPv3 generated emails. Once the Company Preferences interface is displayed make the changes you wish and click the "Save" button at the bottom left of the page.

2.1.7 View Company Public Information

This simply displays what others will see if they look your company up via the RMP Advanced Search. Below in figure 2.16 is a Company Public Profile page.

Figure 2.16

You have now successfully set up your RMPv3 company. You can now being to add cases to the system and process those cases. Should you have any questions or comments please send them to support@recoverymanagerpro.com.